

erwin DI Suite

Reporting Manager

Quick Start User Guide 9.3

About Reporting Manager

The Reporting Manager module lets users generate their own custom reports by writing SQL queries and save these reports and generate an excel output from the same.

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1. Overview

Reporting Manager Module can be used to create flexible reports against a wide range of data sources. The business and technical users of all levels can leverage the powerful reporting engine to create their custom reports that help with faster decision-making and help improve efficiency.


Users can create reports based on requirements and save these within the repository for easy access going forward.

These reports can be executed at run time to view updated results.

The Reporting Manager provides a medium to publish and share reports across the user community bringing in greater collaboration and efficiency.

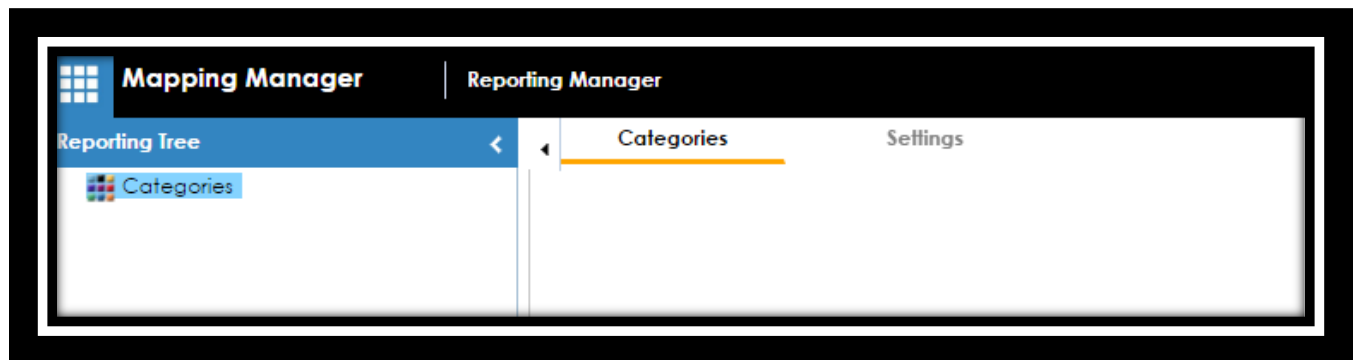
SQL Savvy users can create reusable reports and these can be published to the business community for enterprise wide usage i.e. business users can leverage the reports created by other users and periodically execute them.

2. GUI and Screen Layout

Click on the Module Launchpad icon  on the top left corner and click on **“Reporting Manager”** icon in the Launchpad menu to access the Reporting Manager module.



It redirects you to 'Reporting workspace' menu.

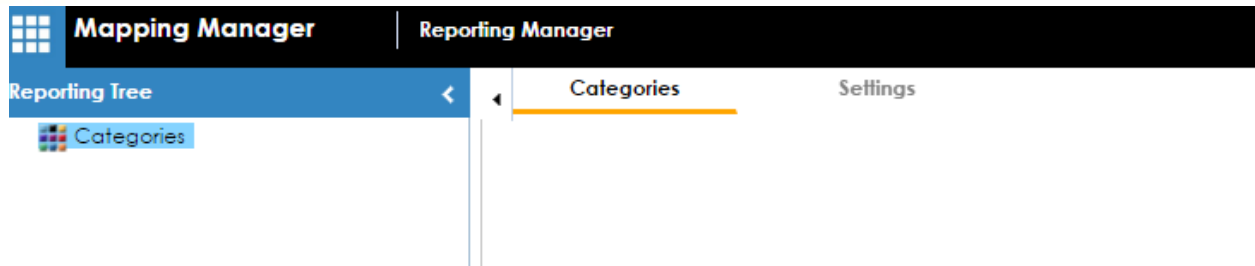


2.1 Generating Custom Reports

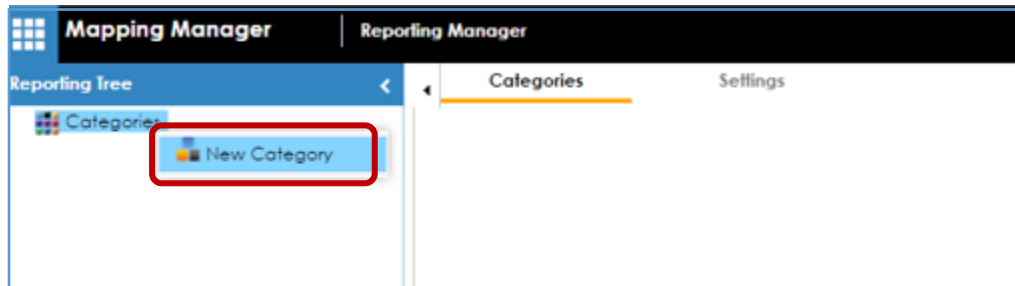
You can create custom reports and classify these reports into categories. We will first look at how we create Categories.

2.1.1 Creating Categories

By Default the Categories node will be visible.



Right click on “Categories” node to create a New Category.



In the New Category popup window, enter the “Category Name” and “Description”

The 'New Category' popup window is displayed. It has a title bar with standard window controls. Inside, there are two main input fields: 'Category Name' with a single-line text input, and 'Description' with a multi-line text area. Above the text area is a rich text editor toolbar with icons for bold, italic, underline, bulleted list, numbered list, and other formatting options. In the top right corner of the window, there are icons for saving (a floppy disk) and closing (an 'X').

Click on the Save Icon .

New Category

Category Name*

Description

The New Category is successfully created.

#	Category Name	Category Hierarchy	Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	History
1	Map_Category		Categories of Mappings	Administrator	2016-12-14 16:34:57.16	Administrator	2016-12-14 16:34:57.16	

Settings

The settings option will help you to manage the size of tables for a page in the grid view. You can move the bar based on your preferences.

Below shown is an example of Size 125 selected i.e. the settings has been set for 125 tables per page.

Reporting Tree

- Categories
 - C1
 - Reports
 - Report
 - Dashboards
 - aa
 - abc

Categories **Settings**

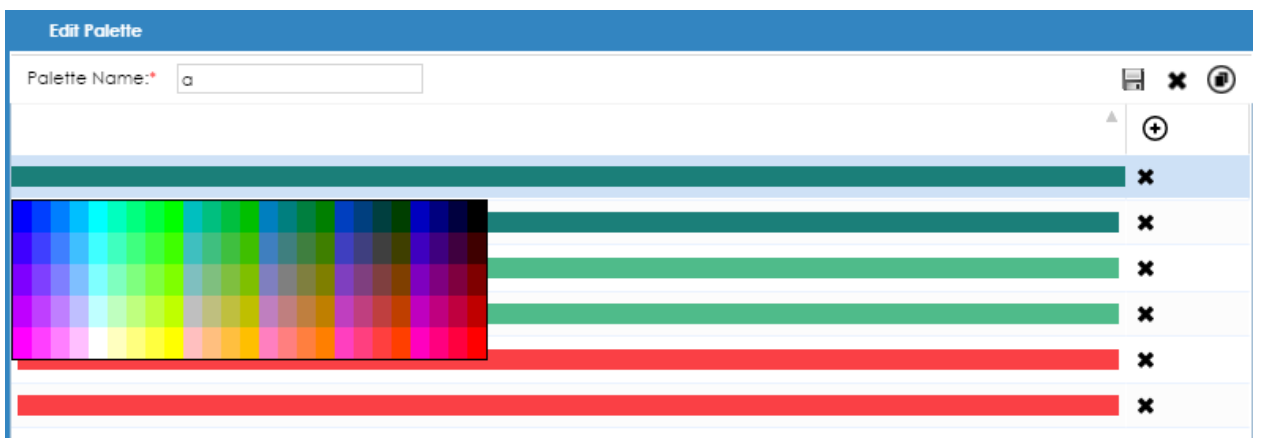
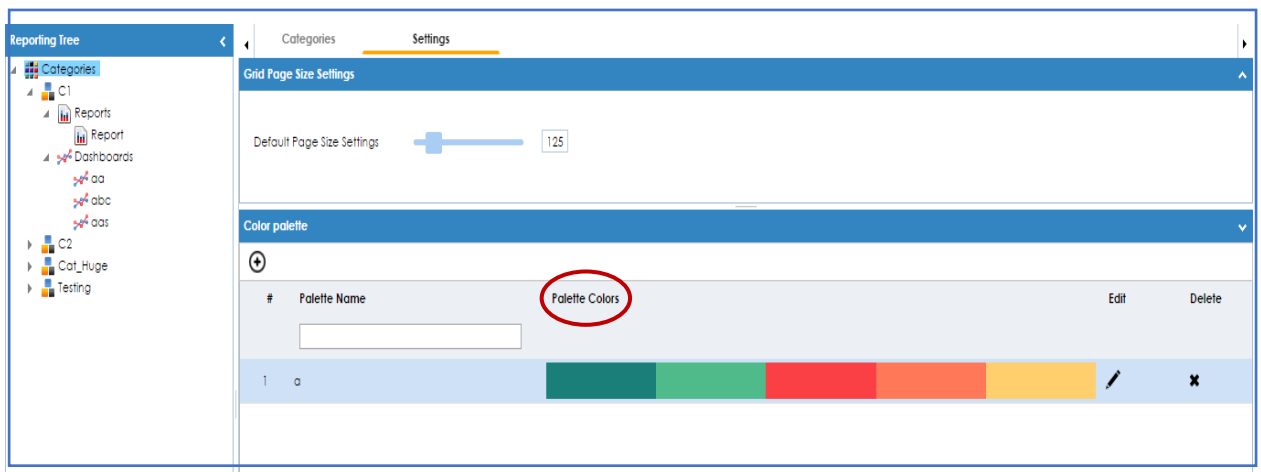
Grid Page Size Settings


Default Page Size Settings

Color Palette

The color palette feature helps the user to mark his multiple attributes involved in the pictorial chart representations using different colors which resembles the attribute's significance.

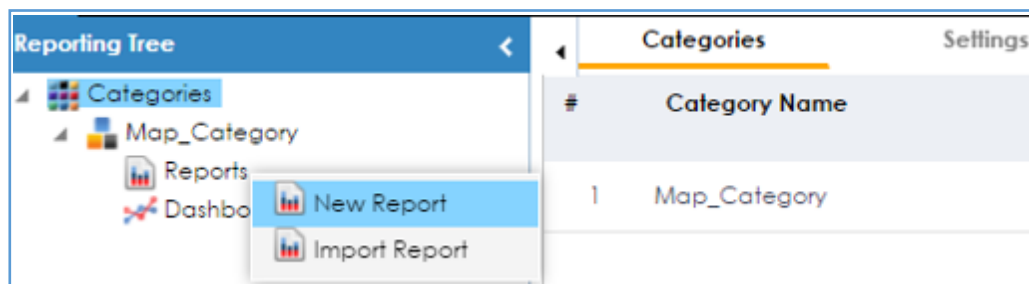
You can add your palettes and edit your palettes using the Add and Edit symbols shown below.



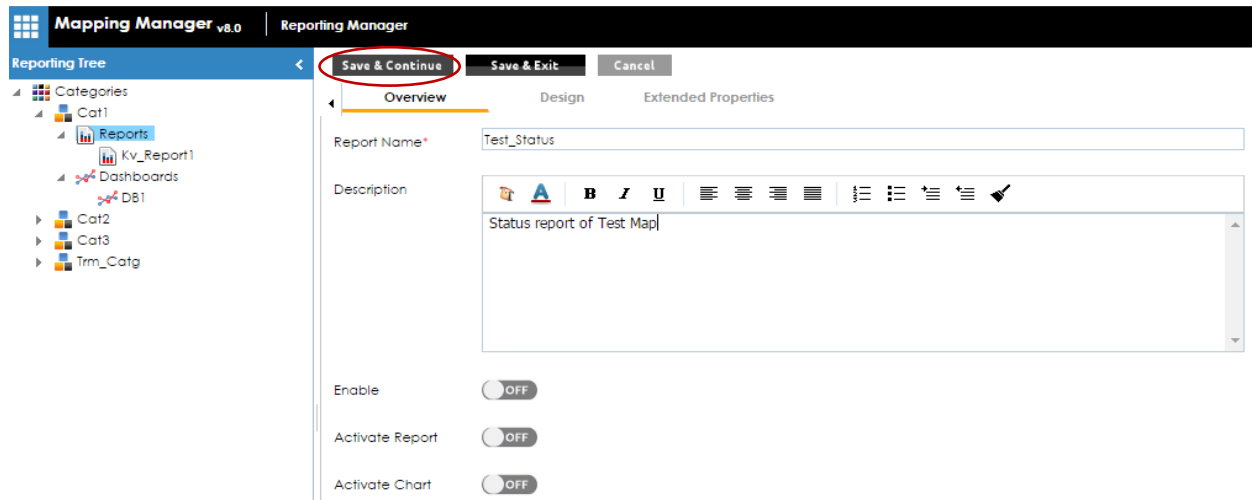
After creating your palettes and editing them you can click on the  icon at the top right side shown in the above screen shot which will save your edit preferences.

2.1.2. Creating Reports

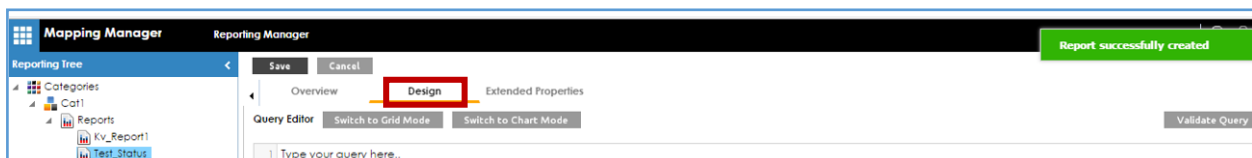
Choose a Category, right click on the 'Reports' node and select **"New Report"**.



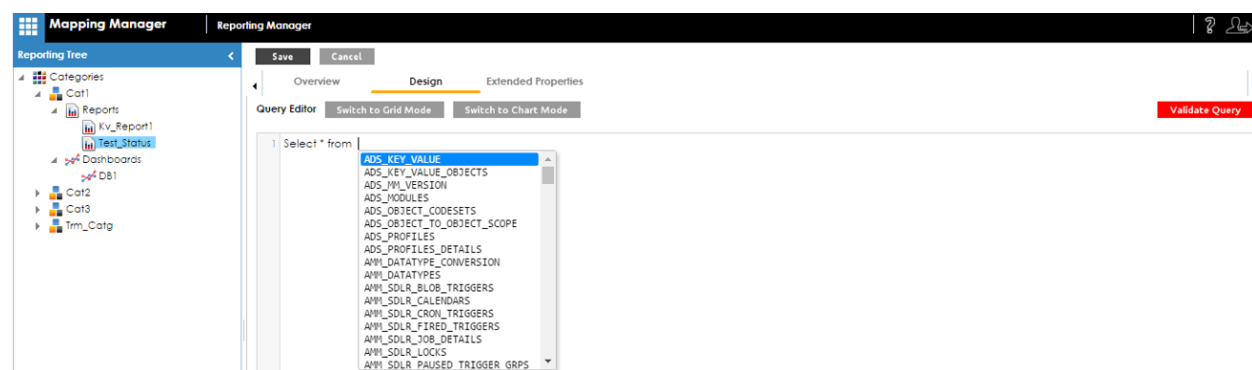
In the Overview section, enter the **"Report Name"** and **"Description"** and click on **"Save & Continue "**



Your Report will be created and the message will be displayed as “Report Successfully created”



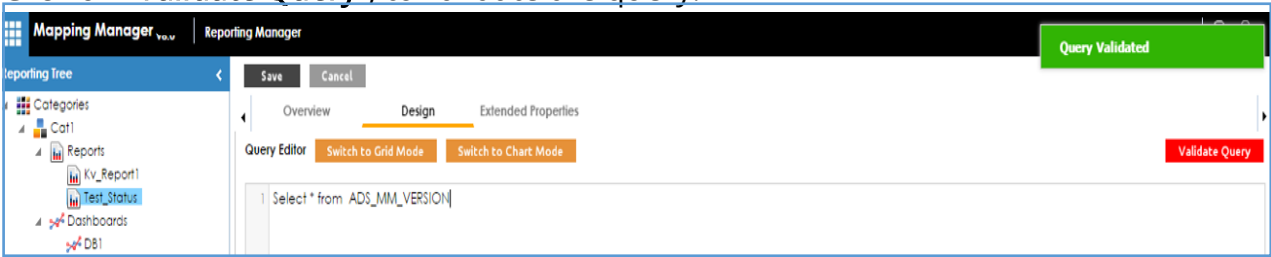
Click on the ‘Design’ tab. Enter your custom query in the SQL Query window.



Note: You can hit Ctrl+Space button, to view the list of Tables present in the AMM database. Do have an option the wrap the query in the Editor window.

User can the **Parameterized Reports** i.e. this is a report that uses input values to complete report processing. Familiar examples of parameterized reports include those that filter by a regional value, a product category, or an identifier. Parameters are typically used to complete a query that selects data for the report.

Click on **“Validate Query”**, to validate the query.



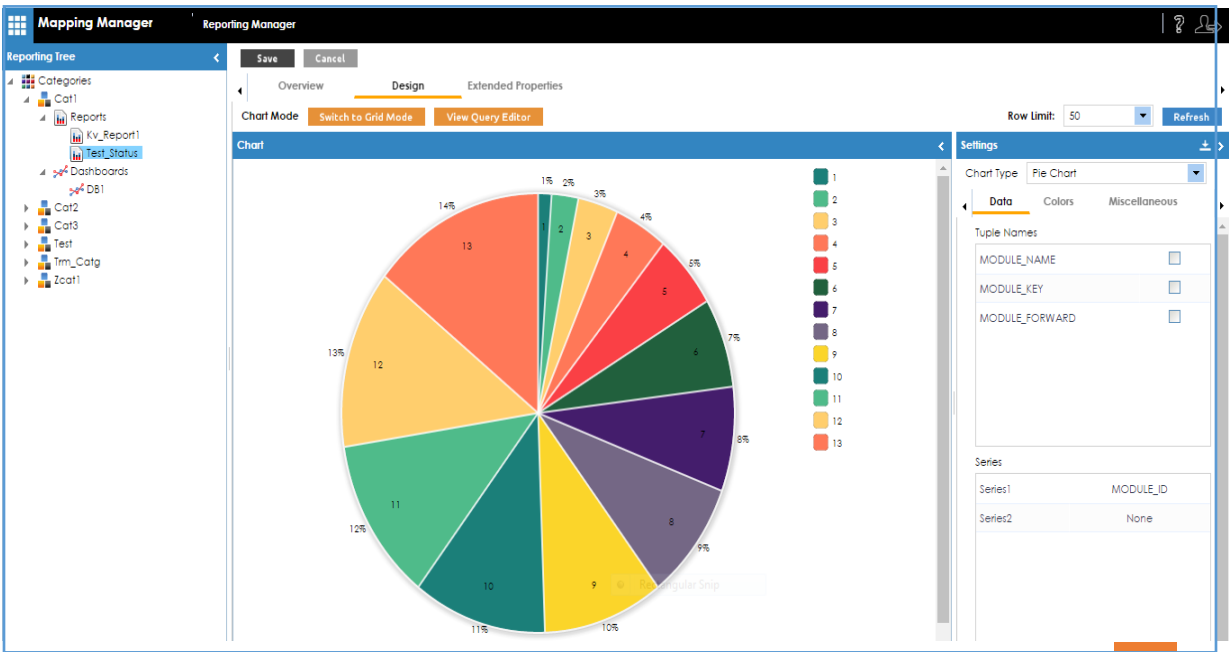
Once the Query gets validated, you can view the columns in two modes

- **Grid mode :**

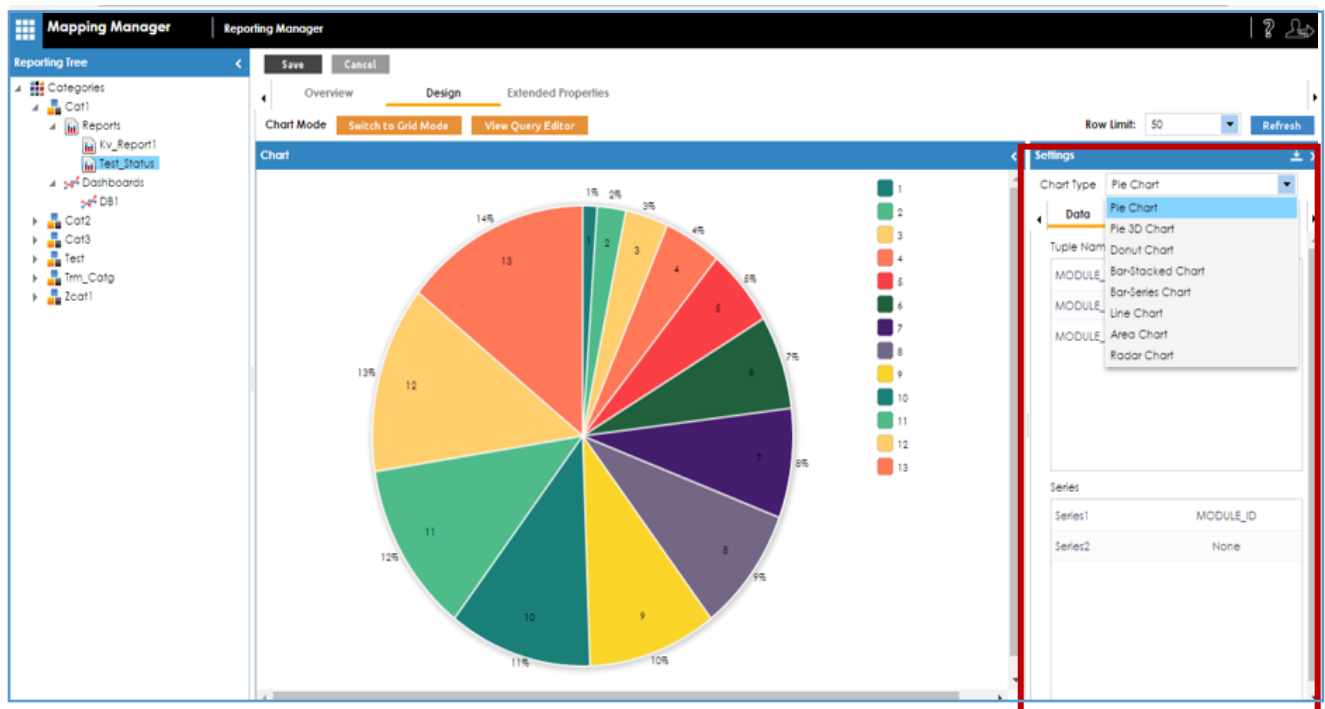
The screenshot shows the Mapping Manager Reporting Manager interface in Grid Mode. The Reporting Tree on the left is the same as in the previous screenshot. The main area shows a table with columns: #, MODULE_ID, MODULE_NAME, MODULE_KEY, MODULE_ORDER, and MODULE_FORWARD. The table contains 6 rows of data.

#	MODULE_ID	MODULE_NAME	MODULE_KEY	MODULE_ORDER	MODULE_FORWARD
1	1	Mapping Manager	com.ads.mm.permission.mm	1	mappingmanager
2	2	System Manager	com.ads.mm.permission.sm	2	systemmanager
3	3	Resource Manager	com.ads.mm.permission.rm	3	resourcemanager
4	4	Codeset Manager	com.ads.mm.permission.cm	4	codesetmanager
5	5	Release Manager	com.ads.mm.permission.rm	5	releasemanager
6	6	Reference Data Manager	com.ads.mm.permission.rdm	6	referencedatamanager

- **Chart mode:**

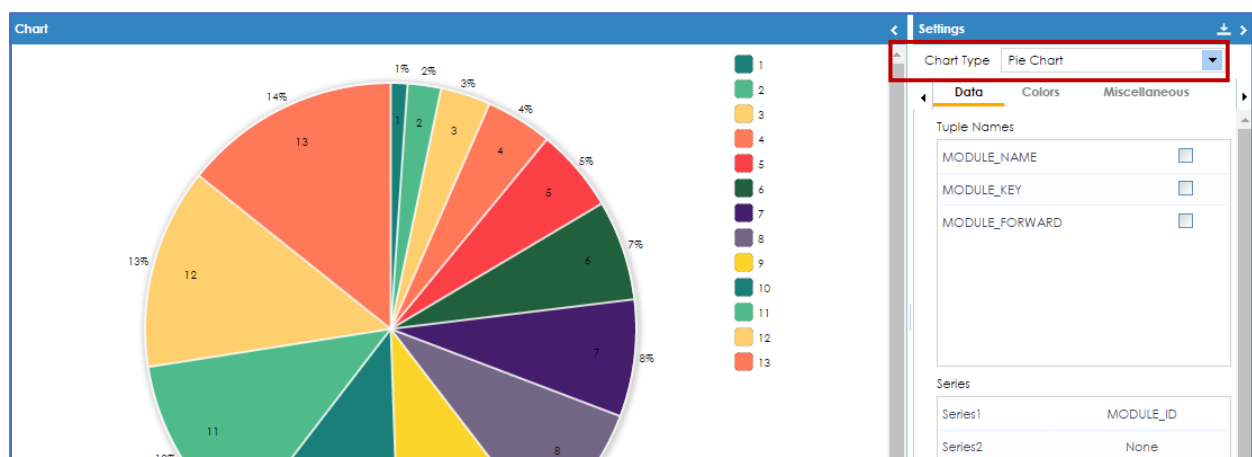


You can select the representation mode of your chart type from the dropdown under the **"Settings"** tab on right hand side of the window

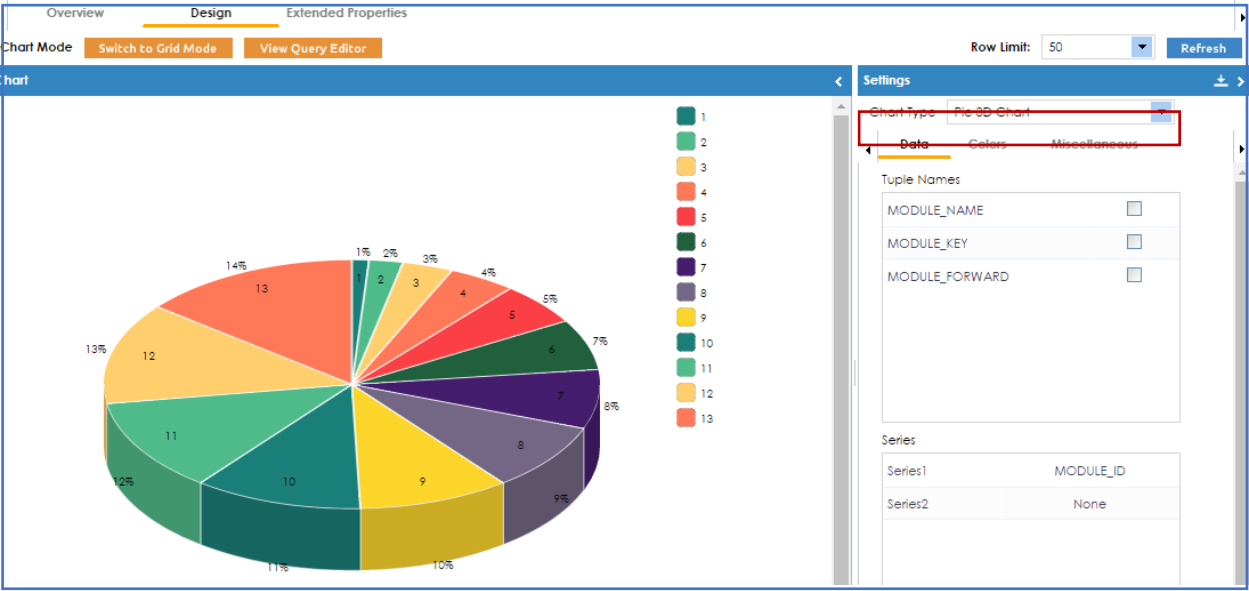


Different views in Chart Types:

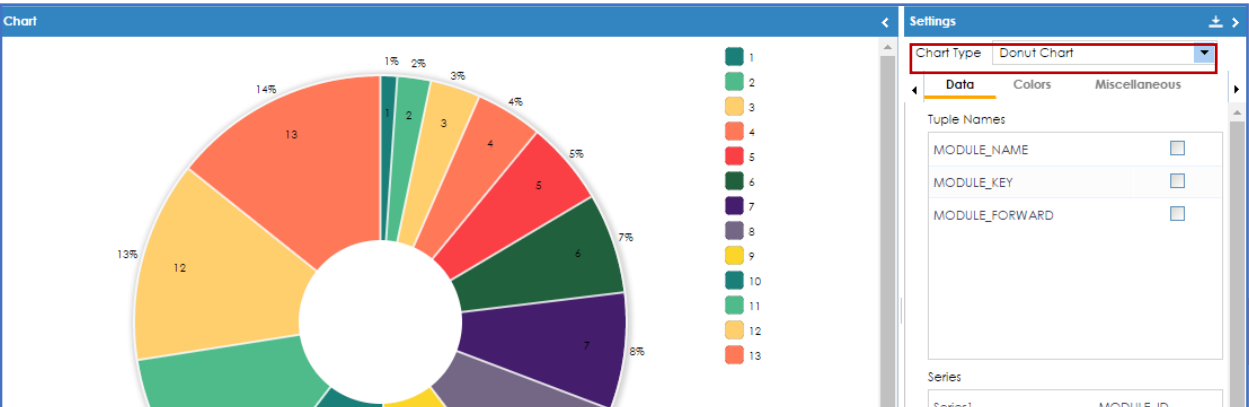
- Representation in **Pie chart** view.



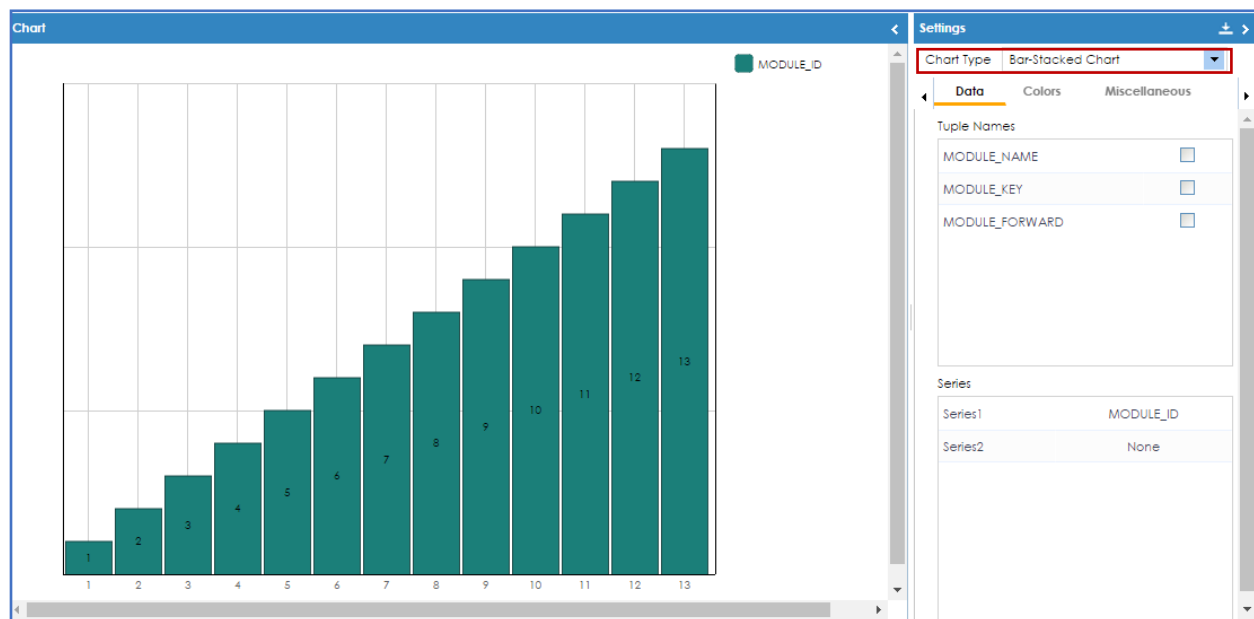
- Representation in **Pie 3D** view



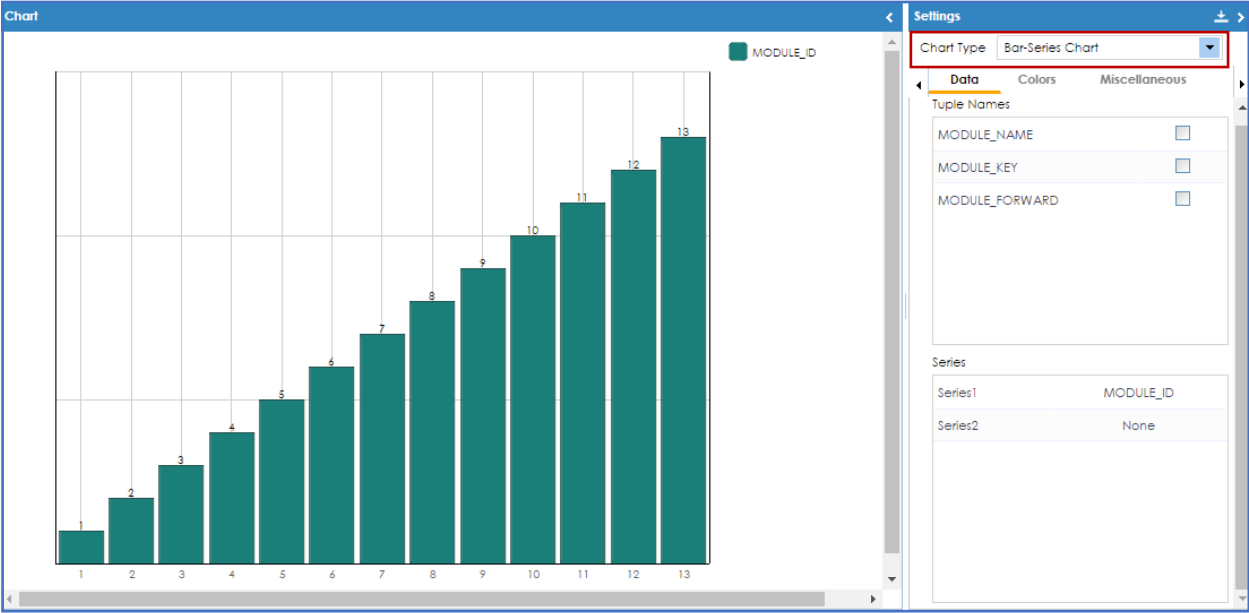
- Representation in **Donut** View



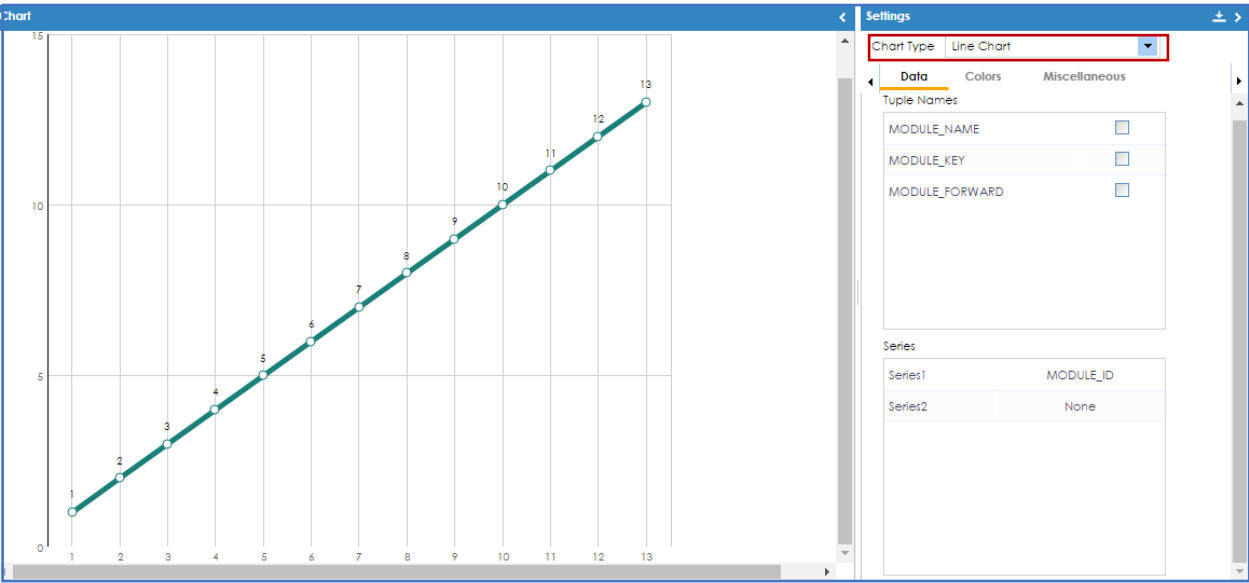
- Representation in **Bar-Stacked** Chart



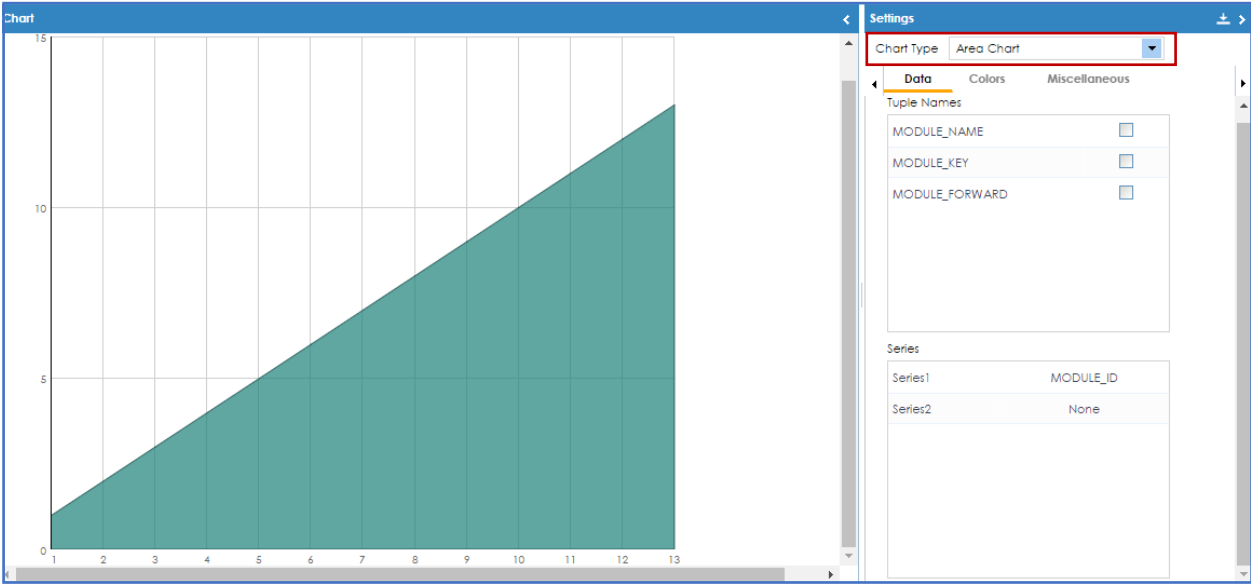
- Representation in **Bar-Series** Chart



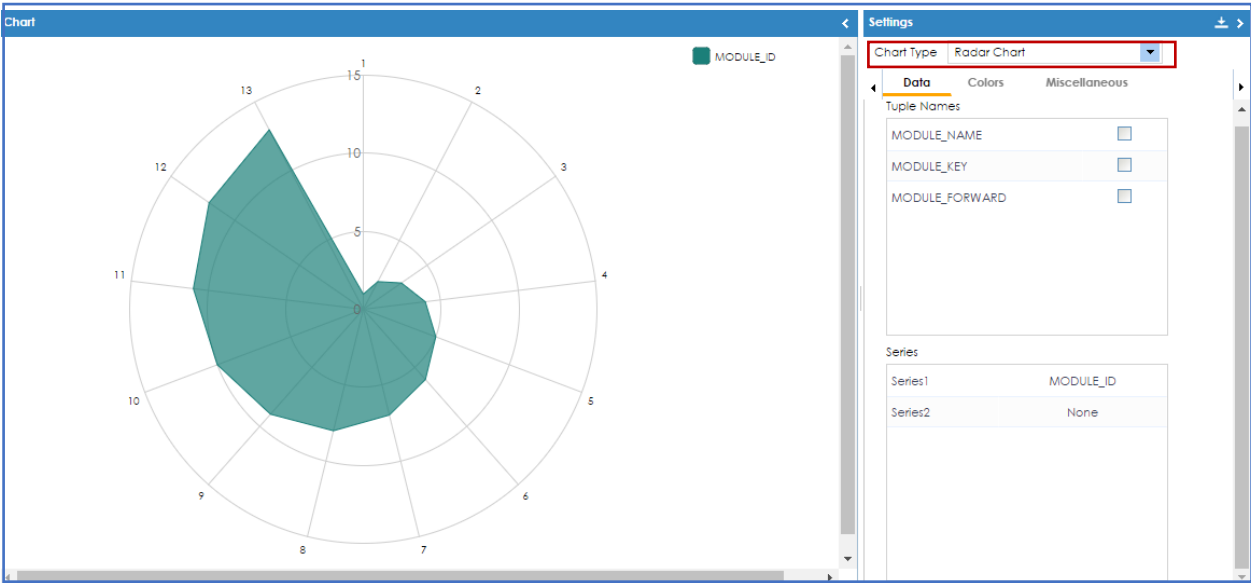
- Representation in **Line** Chart



- Representation in **Area Chart**

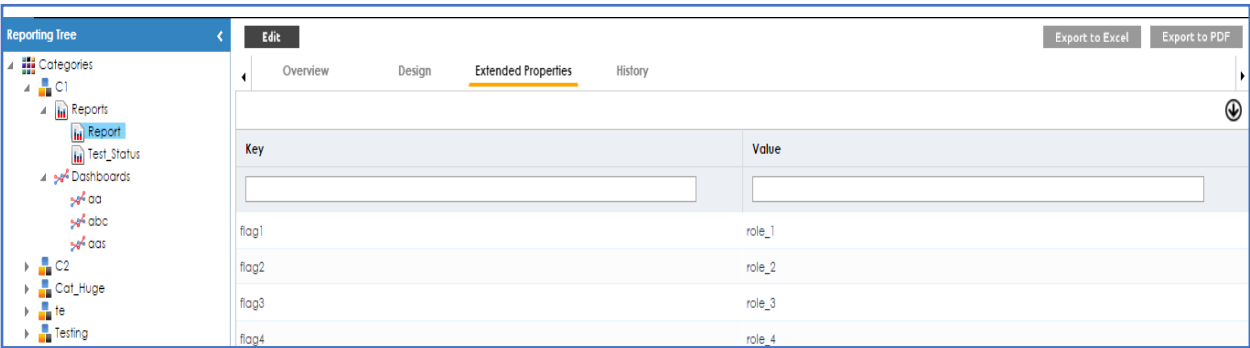


- Representation in **Radar Chart**



Extended Properties

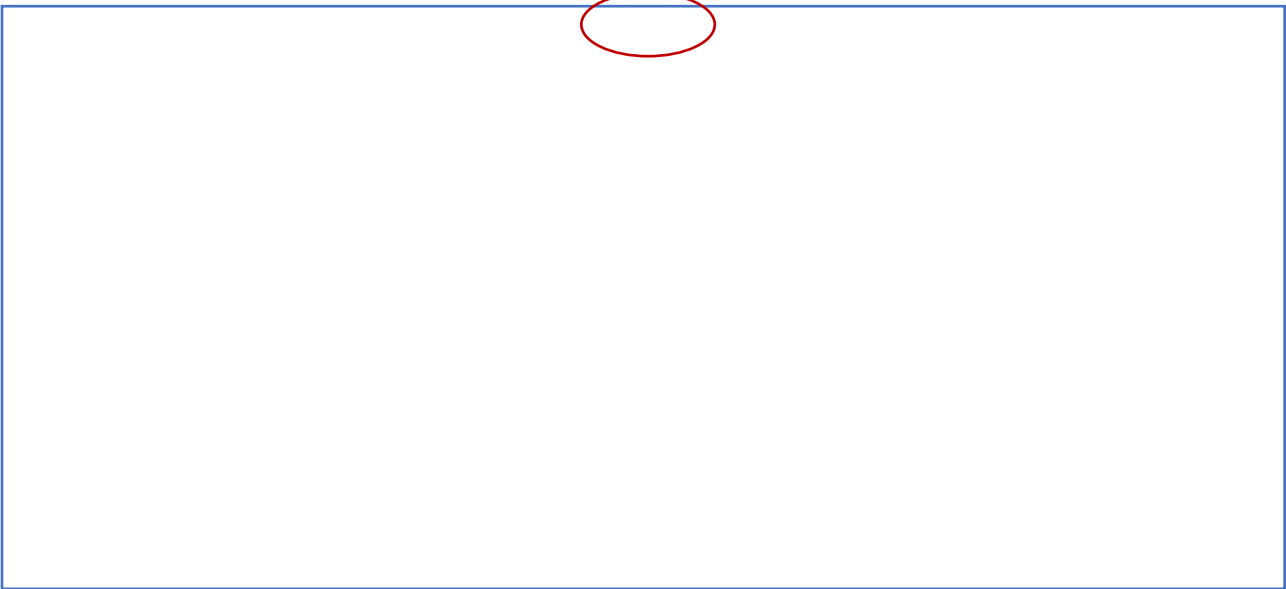
The extended properties option at report level helps the user to create additional fields such as key value pairs that are involved in writing SQL queries.

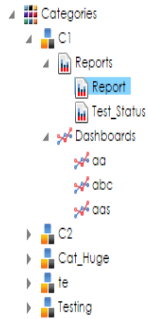


History

History option is provided for the users to check what all the types of reports that are created and who created, along with the date and time details and also the category details across the reporting manager module.

It also keeps a track of the alterations that are made to the reports across the module.

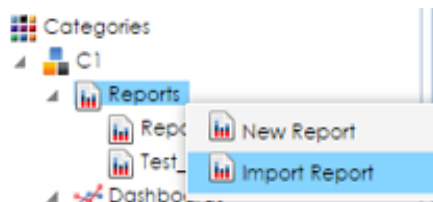




Overview Design Extended Properties History				
#	Type	Details	Date	User
1		Category Name : C1 Report Id : 1 Report Name : Report Category Id : 1	12/11/2016 13:37:37	Administrator
2		Category Name : C1 Report Id : 1 Report Name : Report Category Id : 1 Download : Report	12/11/2016 13:38:55	Administrator
3		Category Name : C1 Report Id : 1 Report Name : Report Category Id : 1 Download : Report Category Name : C1	12/11/2016 13:41:12	Administrator

Besides creation of the reports, Reporting Manager module provides other options such as –

Import Report: A user can import the report from other categories.



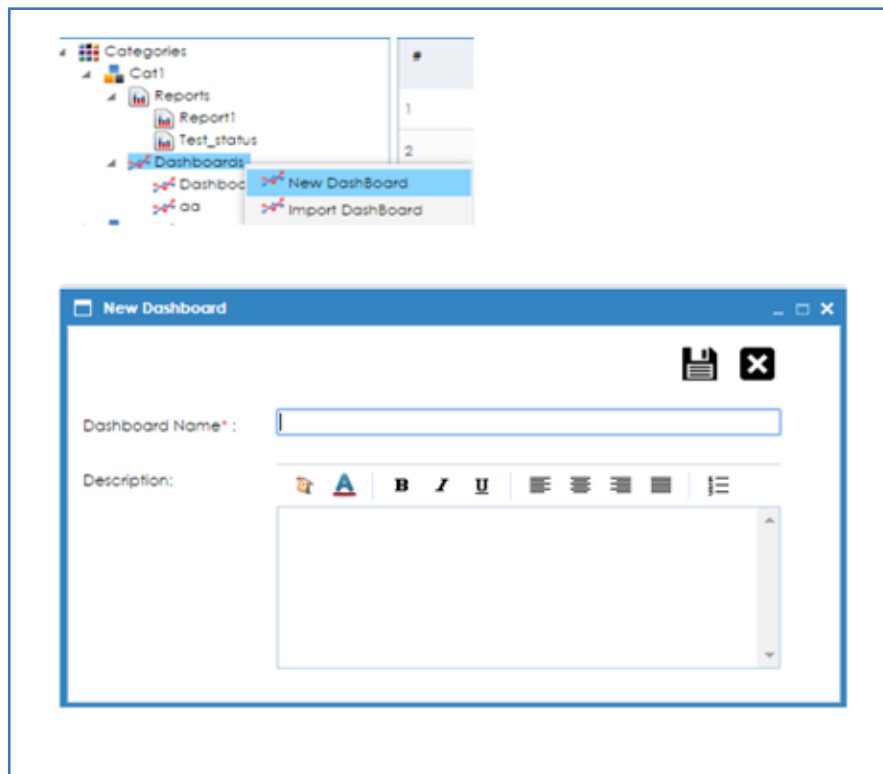
- **Copy Report** – Depending on the requirements report can be copied and pasted in the other categories.
- **Export Report:** User can share the report to the clients by exporting it using export option. Report will be downloaded in the XML format.


3. Creating Dashboards

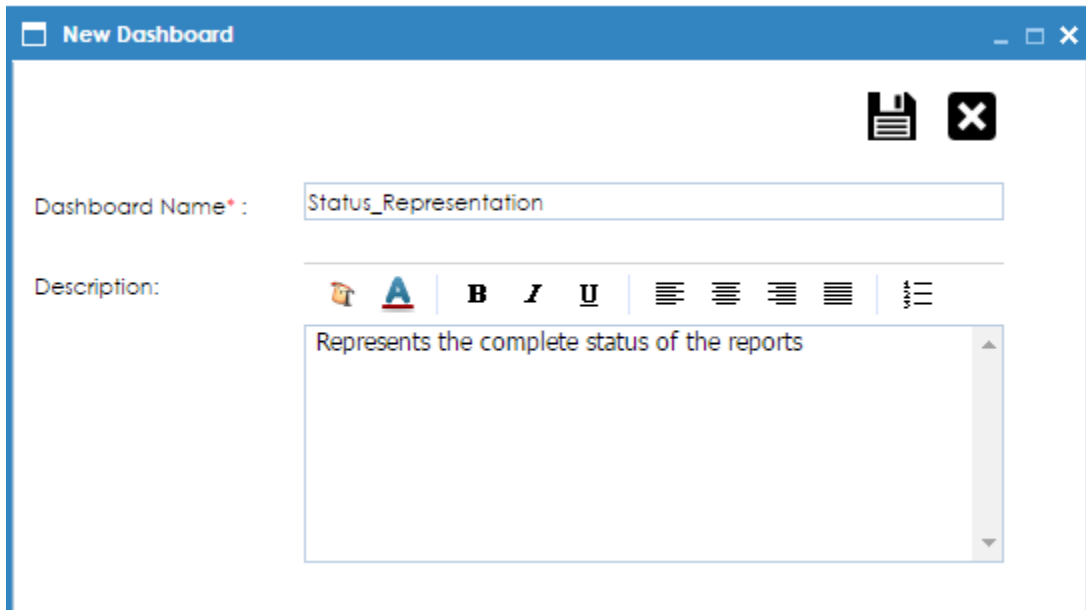
A dashboard is collection of charts and reports.

Reporting Tree		Dashboard Details							
#	Dashboard Name	Category Name	Dashboard Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	History	
1	aa	Cat1		Administrator	2016-12-15 15:38:07.18	Administrator	2016-12-15 15:38:07.18	🔍	
2	Dashboard1	Cat1	desc	user1	2016-12-15 11:19:22.12	user1	2016-12-15 11:25:31.093	🔍	

If we right click on the “Dashboards” node, it gives option to create a new dashboard.



Enter the dashboard name and description and click on  icon



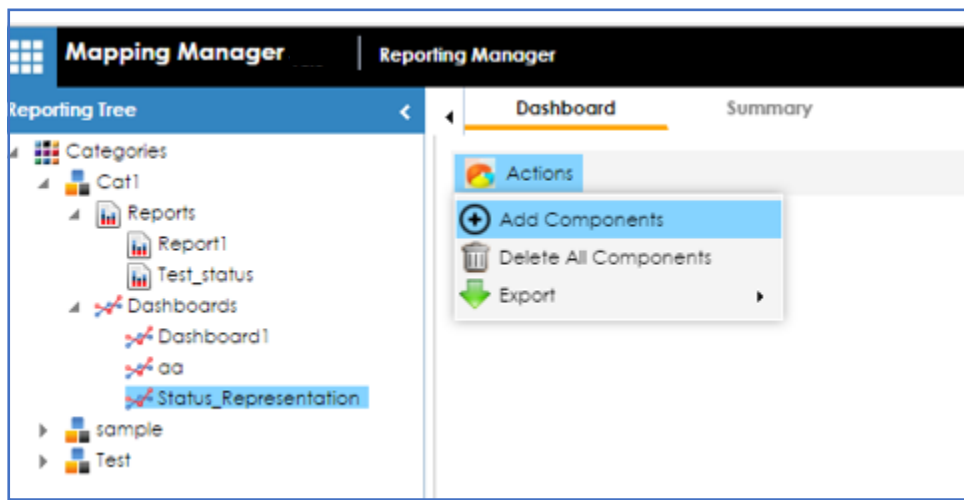
New Dashboard

Dashboard Name*: Status_Representation


Description:

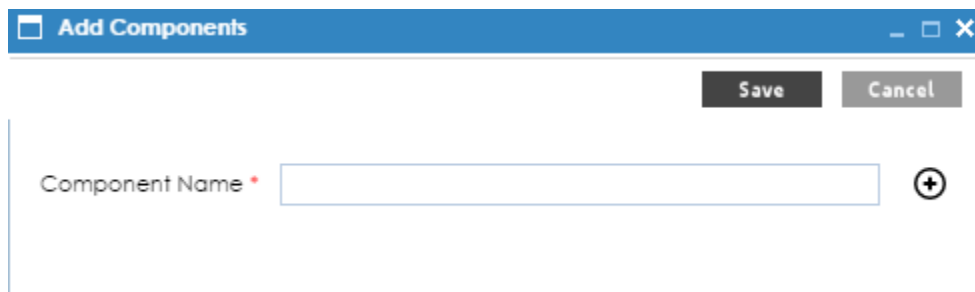
Represents the complete status of the reports

Now you see your dashboard component will be created under the “Dashboard” node as shown in below screenshot.




Under the “Dashboard” tab click on Actions icon to Add / Delete components to the Dashboard and Export the dashboard to either Excel or PDF formats.

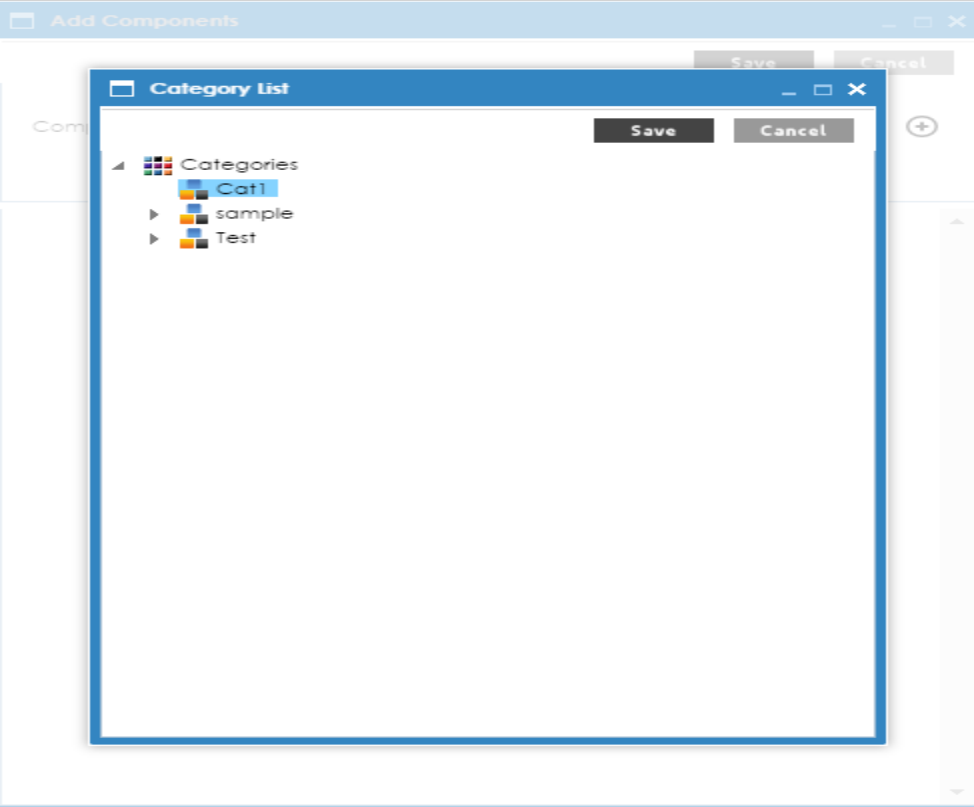
- Add Components: On clicking the  icon, it will allow give you a dropdown to pick and choose the component which has to be added from the list of the categories and click on Save option.

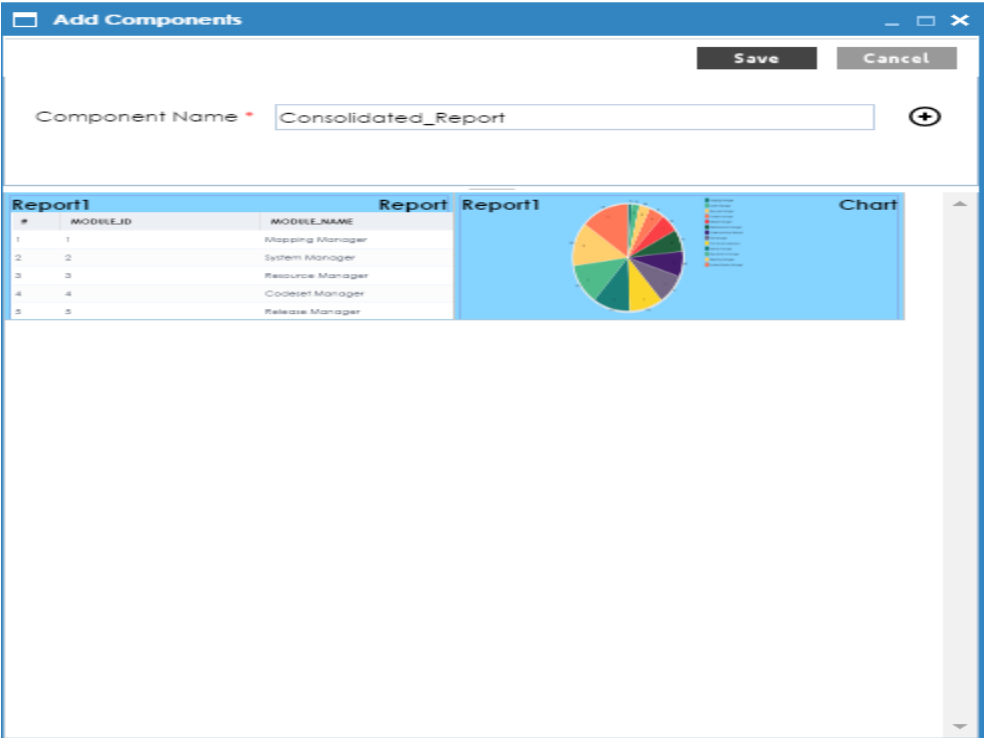


Add Components

Save Cancel

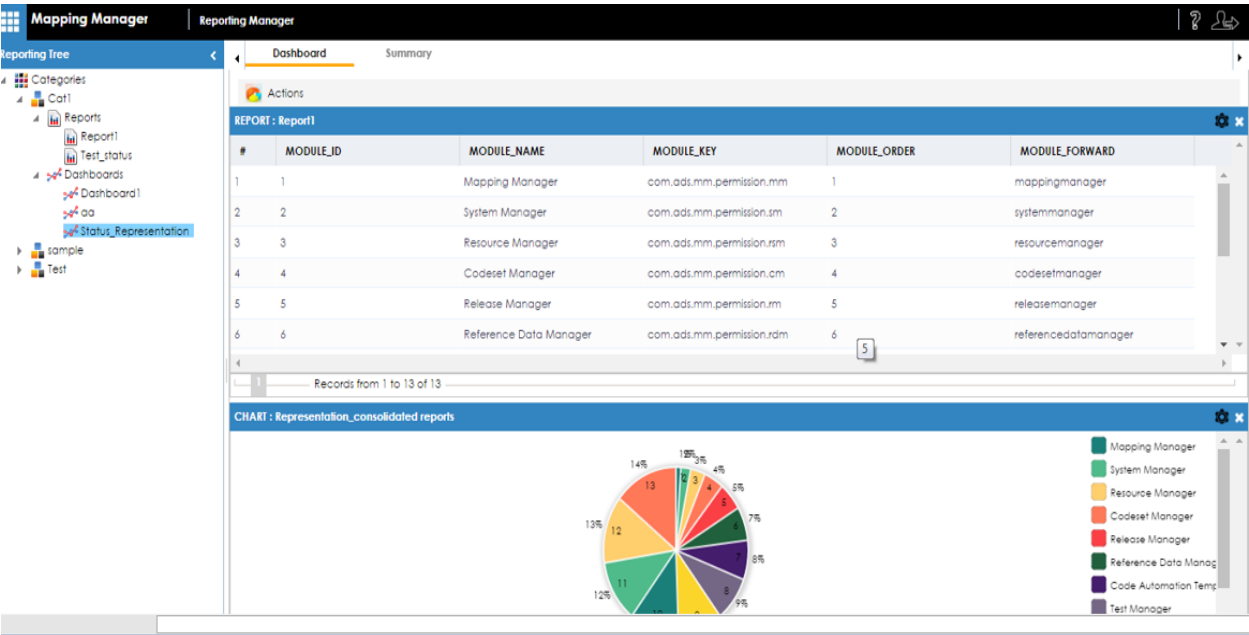
Component Name 





After selecting the category from the categories list, It shows you the reports that are involved as part of that component and user can give a name and click on the Save option present towards right side of the screen.

It gives you a dashboard which consists of the consolidated report of the charts and reports in both grid and chart views.



Extended Properties

Even at the Dashboard level also you have the extended properties option which helps the user to create additional fields such as key value pairs based on his/her requirements.



Click on the Settings icon for Extended Properties feature.

Extended Properties feature gives users to add their additional values/Edit the existing values / upload excel /Delete/Export Excel options.

Reporting Tree

- Categories
 - Cat1
 - Reports
 - Report1
 - Test_status
 - Dashboards
 - Dashboard1
 - aa
 - Status_Representation
 - Sample
 - Test

Dashboard Summary

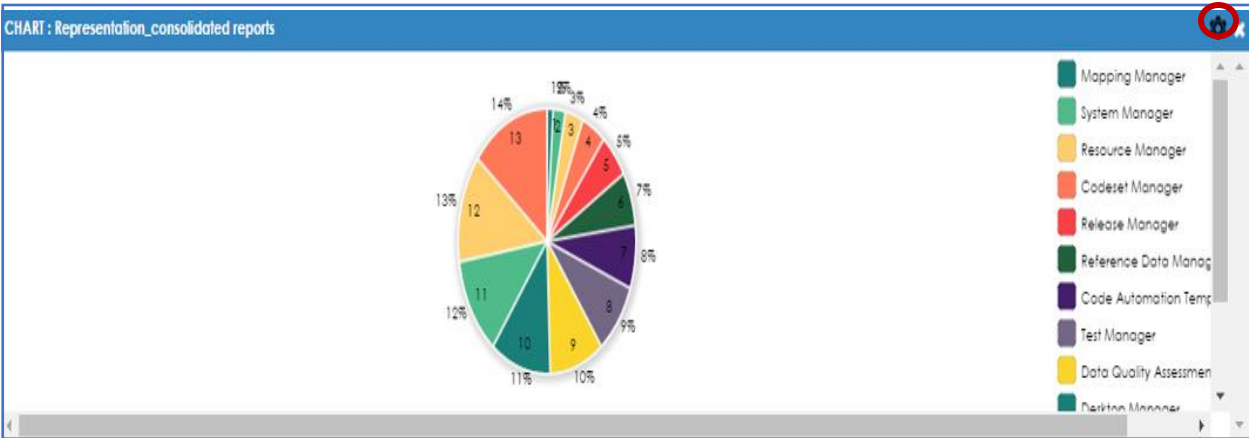
Actions

REPORT : Report1

#	MODULE_ID	MODULE_NAME	MODULE_KEY	MODULE_ORDER	MODULE_FORWARD
1	1	Mapping Manager	com.ads.mm.permission.mm	1	mappingmanager
2	2	System Manager	com.ads.mm.permission.sm	2	systemmanager
3	3	Resource Manager	com.ads.mm.permission.rm	3	resourcemanager
4	4	Codeset Manager	com.ads.mm.permission.cm	4	codesetmanager
5	5	Release Manager	com.ads.mm.permission.rm	5	releasemanager
6	6	Reference Data Manager	com.ads.mm.permission.rdm	6	referencedatamanager

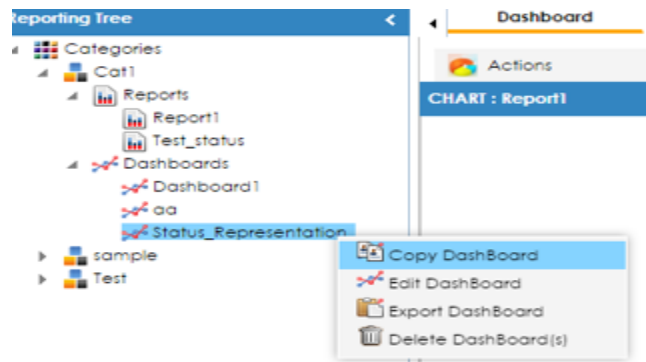
This feature is present at both the views Grid and Chart. Above shown screenshot is an example for the Grid view.

Extended Properties	
<div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div>	
Key	Value
<div></div>	<div></div>
No Records Found	
Page 1	

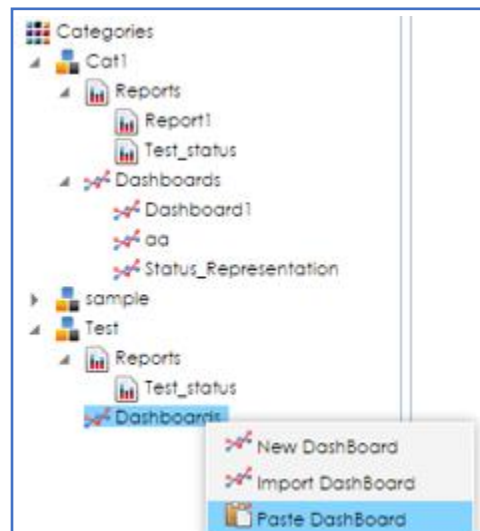


Extended Properties	
<div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div>	
Key	Value
k1	v1
Records from 1 to 1	
Page 1	

Right click on the dashboard node will give the user to Copy DashBoard/Edit DashBoard/Export DashBoard and Delete DashBoard options.



Copy dashboard – Allows user to copy the dashboard from one category to another category.



Edit Dashboard: Allows user to modify the existing dashboard.

Edit Dashboard

Dashboard Name*:

Description:

A consolidated report in both the views i.e. dashboard

Export Dashboard: Allows user to export the complete dashboard.

Delete Dashboard: If user wants to delete the existing dashboard, Right click and select the delete option.